

ENTERPRISE SOFTWARE PROFESSIONAL SERVICES SUCCESS MODEL

S + C + E + P / CIR

For: Charleston Digital Corridor
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THE DELIVERY

ADVISORY GROUP



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AGENDA

THE DELIVERY
ADY GROUP

- Introduction
- The Formula
- The Components
- Pulling It All Together
- Q&A



INTRODUCTION

THE DELIVERY
ADVISORY GROUP

- 20+ Years of Professional Services in Enterprise Software
- 15+ Years of Practice Management – P&L and Team Leadership
- 10+ Years with SaaS Companies – Public & Private
- 10+ Years of Enterprise/IT PMO Creation & Management Consulting
- Optimization & Growth Focus – Scales, Builds, Optimizes & Fixes
- Global Know How & Outsourcing/Offshoring – North America, Europe, India & Philippines
- Multiple Industries – Healthcare Financial Services & More
- Customer Advocate – Agile & Right-Sized Methodologies

- Founded “The Delivery Advisory Group” in Dec 2017
- “Fractional” Leadership & Strategic Delivery Assessments
- COO for Technology Lab (Silicon Harbor Labs)
- VP, Professional Services (AMTdirect)

THE FORMULA

THE DELIVERY
ADY BODY GROUP

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- 5 Components
- All are Necessary
- Proven & Prescribed
- Can be Learned
- Experience Required



Slow-cooker SUPPER

Wednesday
Brisket with Root Vegetables

Prep: 15 min.
Cook: 8 hr. Serves: 6
Cost per serving: \$3.39

- 1 medium sweet potato, peeled, cut into 2-inch pieces
- 1 medium turnip, peeled, cut into 2-inch pieces
- 2 carrots, peeled, cut into 2-inch pieces
- 2 parsnips, peeled, cut into 2-inch pieces
- 1 3- to 4-lb. beef brisket
- Salt and pepper
- 1½ tsp. onion powder
- 1½ tsp. garlic powder
- 1 cup low-sodium beef broth
- ¼ cup finely chopped fresh parsley

- 1 Arrange sweet potato, turnip, carrots and parsnips in a slow cooker. Rub brisket with salt, pepper, onion powder and garlic powder. Place brisket on top of vegetables. Pour broth into cooker. Cover and cook on low until beef is tender, 6 to 8 hours.
- 2 Remove brisket to a cutting board and let stand 10 minutes. Skim fat from pan juices. Slice brisket. Place meat on a plate with vegetables, spoon pan juices over, sprinkle with parsley and serve.

PER SERVING: 486 Cal., 20g Fat (7g Sat.), 164mg Chol., 5g Fiber, 57g Pro., 22g Carb., 525mg Sod.

S = STRATEGY (PS)

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- PS exists for 1 reason only!!!
 - To get customers to successfully utilize your product/s
- How
 - 1 size does NOT fit all
 - Decision has major implications
- Financial Options:
 - Profit Center - Margins
 - Cost Center – Loss/BE, free Svcs?
 - Enabler – get to ARR ASAP
 - Hybrid – very popular



C = CUSTOMER

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- Customer Satisfaction
 - “The customer may not always be right, but is never wrong!”
- This is all about DELIVERY!
 - Expectation Management
 - Oversight & Governance
 - Feet in Building (FIB)
 - Executive Support
- Delight your customers
 - If done correctly, is paid back multiple times over....
 - References fuel growth
 - Net Promoter Score



E = ENGAGEMENT

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- Employees

- Engaged
- Educated (on your company, product/s, processes)
- Right Skillsets (remember customer delight?)

- Satisfaction

- Onboarding
- Career Development
- Training & Coaching
- Perks
- Management Strength/Depth

- Tricky to manage, BUT

- Best Software/product is not enough



P = PRACTICE

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- P&L
 - Revenue, Cost, Margins
 - Utilization
- Delivery Model
 - National/Regional/International
 - Shared Services/Product
 - Standard/Custom
 - On/Offshore
 - Tools (i.e. PSA)
- Methodology
 - Repeatability, Scalability
 - Roles & Mix
 - Partners



CIR = CRITICAL INTERNAL RELATIONSHIPS

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Sales

Contracts & Terms
SOW's & Estimates
Proposals & Sales Calls



Livelihood
& Oxygen

Product/Dev

Roadmap
Release Cadence
Quality & Maturity



Partner



Customer Success *

Account Mgt – Delivery Coordination
Support – Hand-off post Go Live
* PS may be part of CS organizationally

HR

See Engagement



Support



Finance

See P&L Mgt

$$S + C + E + P / CIR = PS SUCCESS$$

Professional Services Strategy

Profit vs. Cost Center/Enabler vs. Hybrid

Customer Sat

Project Delivery

- Expectation Mgt
- Oversight & Governance
- Feet in Building (FIB)
- Executive Support

References

Net Promoter Score

P&L + Practice Mgt

Revenue

Delivery Model

Cost

- National/Regional/Intl

Margin

- Shared Svs/Product

Utilization

- Standard /Custom
- On/Offshore
- Tools (i.e. PSA)

Methodology

- Repeatability & Scalability
- Roles & Mix
- Partners

Engagement

Employee Sat

Performance Mgt

Skill Sets

Hiring/Onboarding

Career

Development

Training/Coaching

Mgt Strength/Depth

Sales

Contracts & Terms
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Customer Success *

Account Mgt – Delivery Coordination
Support – Hand-off post Go Live
* PS may be part of CS organizationally

Product/Dev

Roadmap
Release Cadence
Quality & Maturity

HR

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Finance

See P&L Mgt

WHAT QUESTIONS

CAN I ANSWER

FOR YOU ?



THANK YOU

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